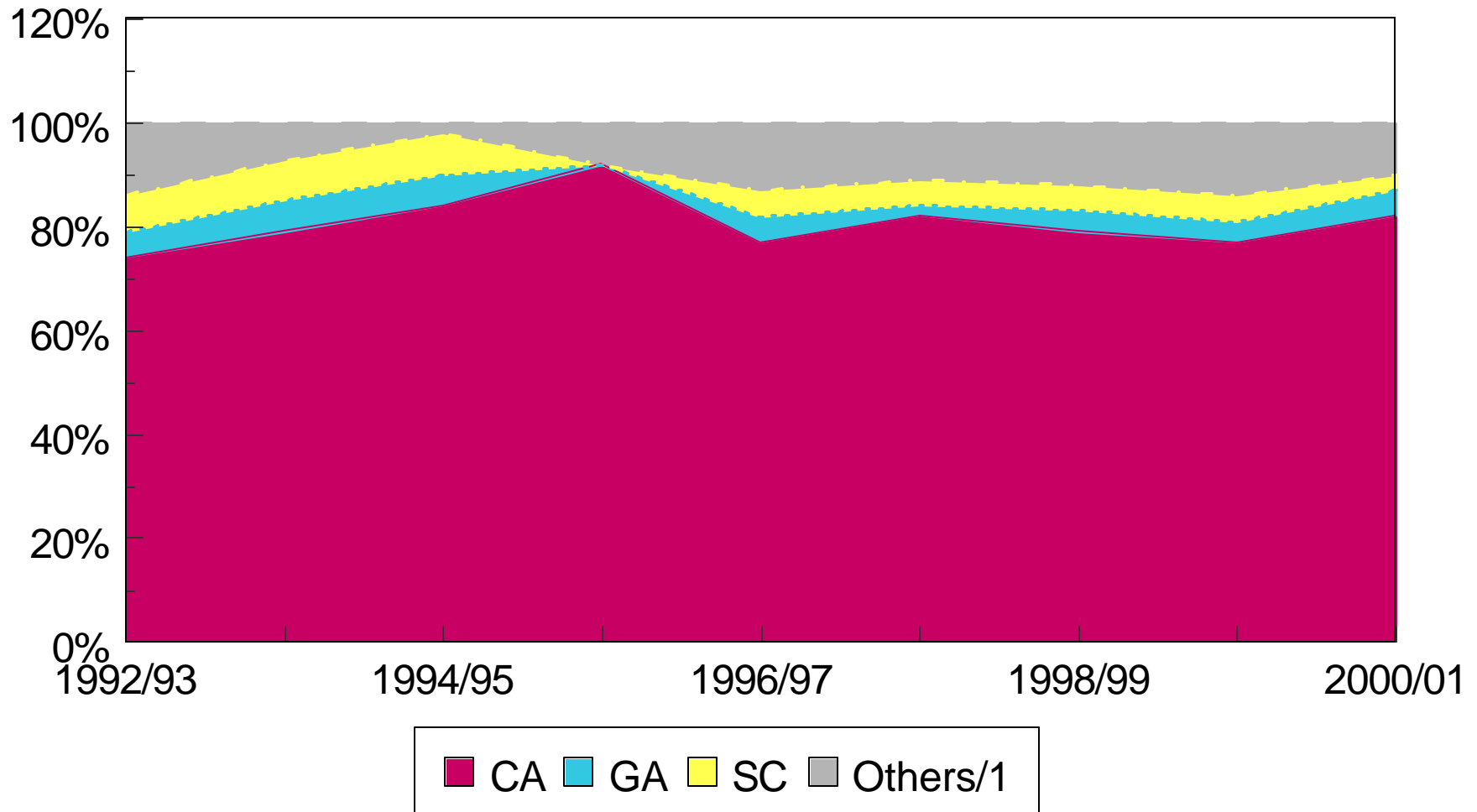


The U.S. Peach & Nectarine Industry Situation

**Foreign Agricultural Service
Horticultural & Tropical
Products Division
April 2002**

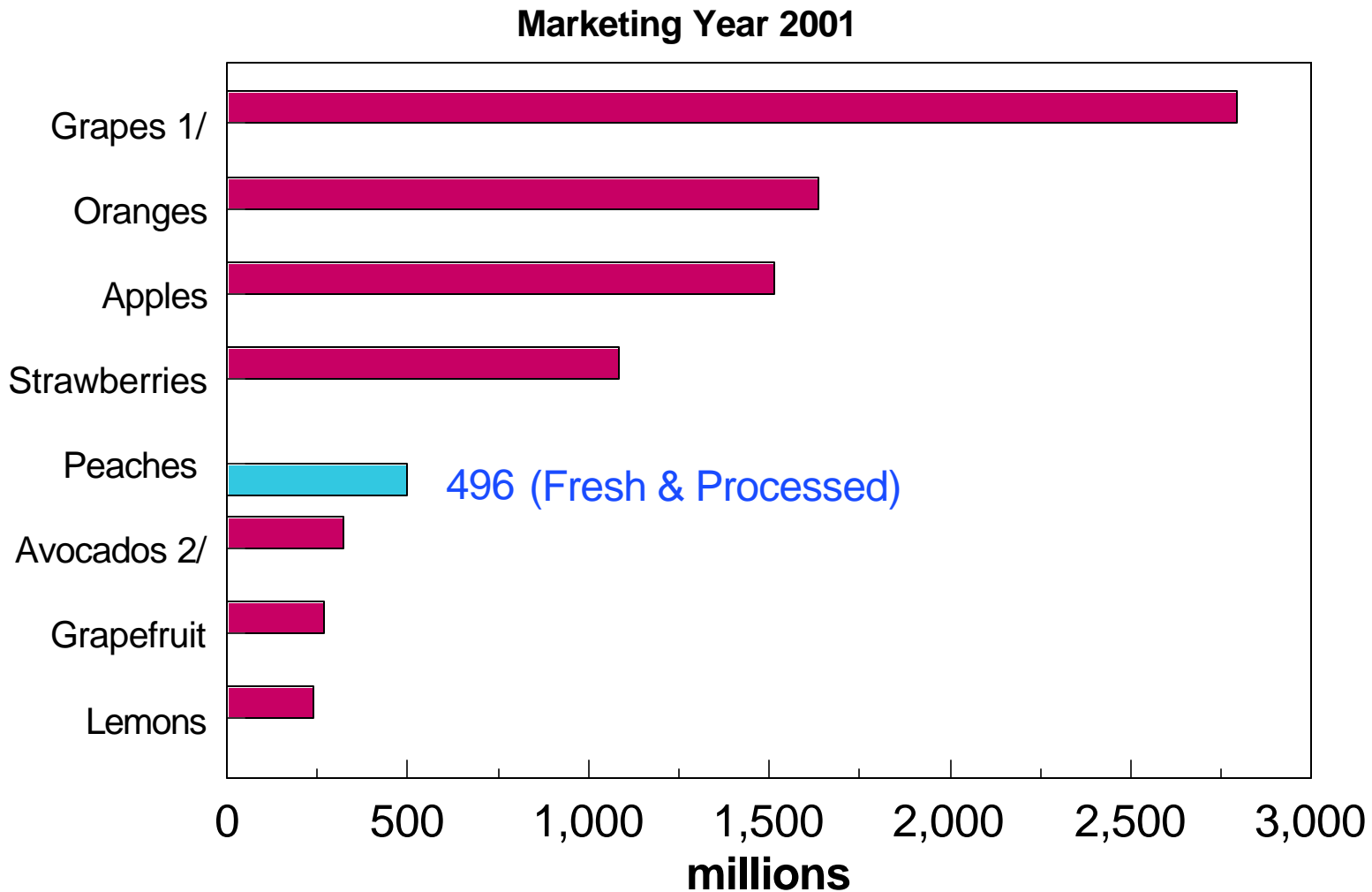
California Produces Approximately 80 Percent Of The U.S. Peach & Nectarine Crop



1/ Significant contributors to this category include NJ, MI, PA, WA

Source: USDA National Agricultural Statistics Service

The 2001 Value of Utilized Peach Production Ranks Among the Top Five U.S. Fruits

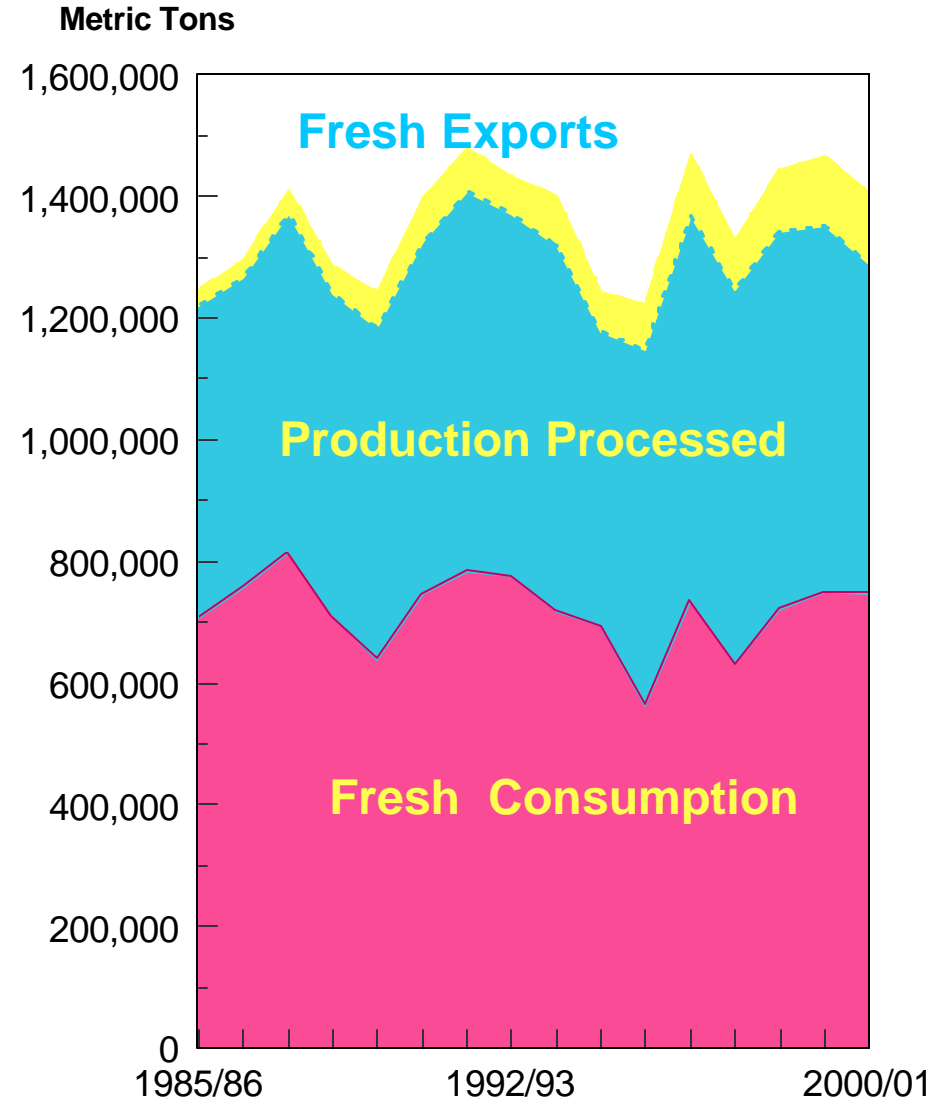
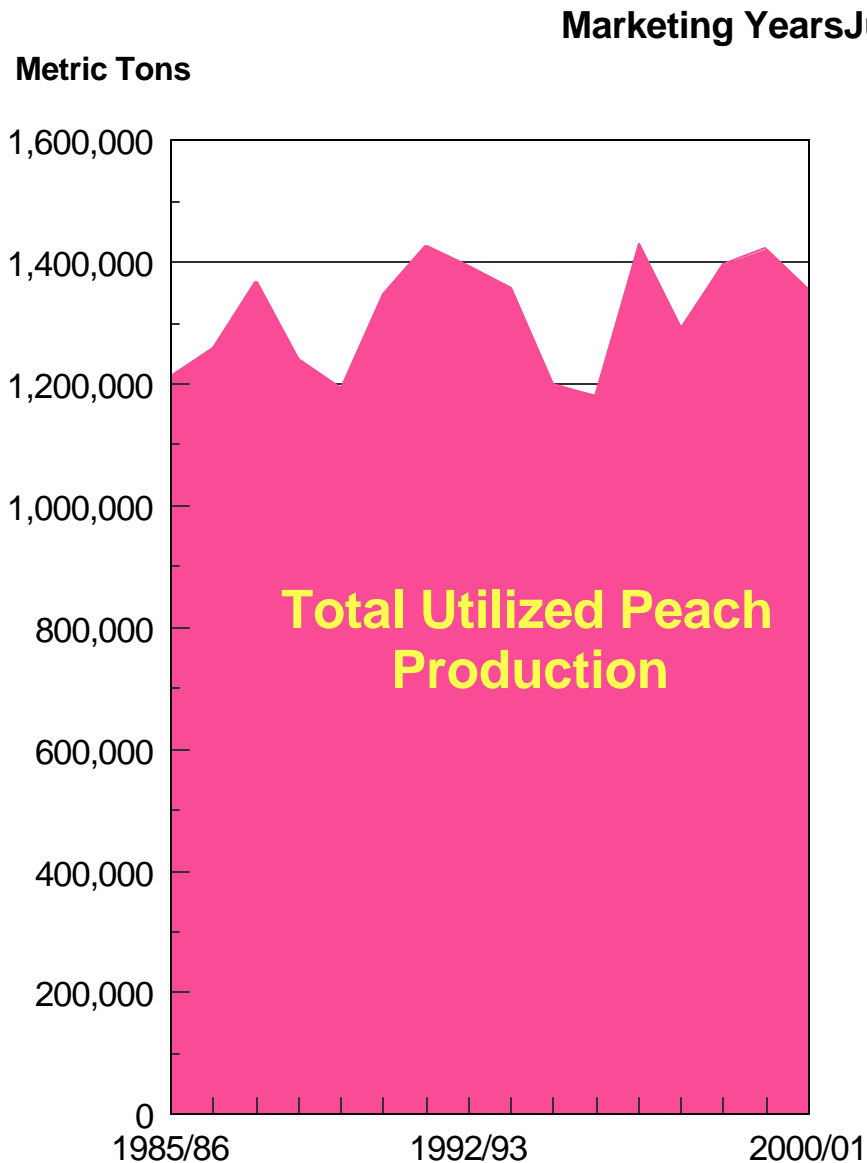


1/ Includes grapes for fresh table, dried, and wine use.

2/ 2000 value

Source: USDA National Agricultural Statistics Service

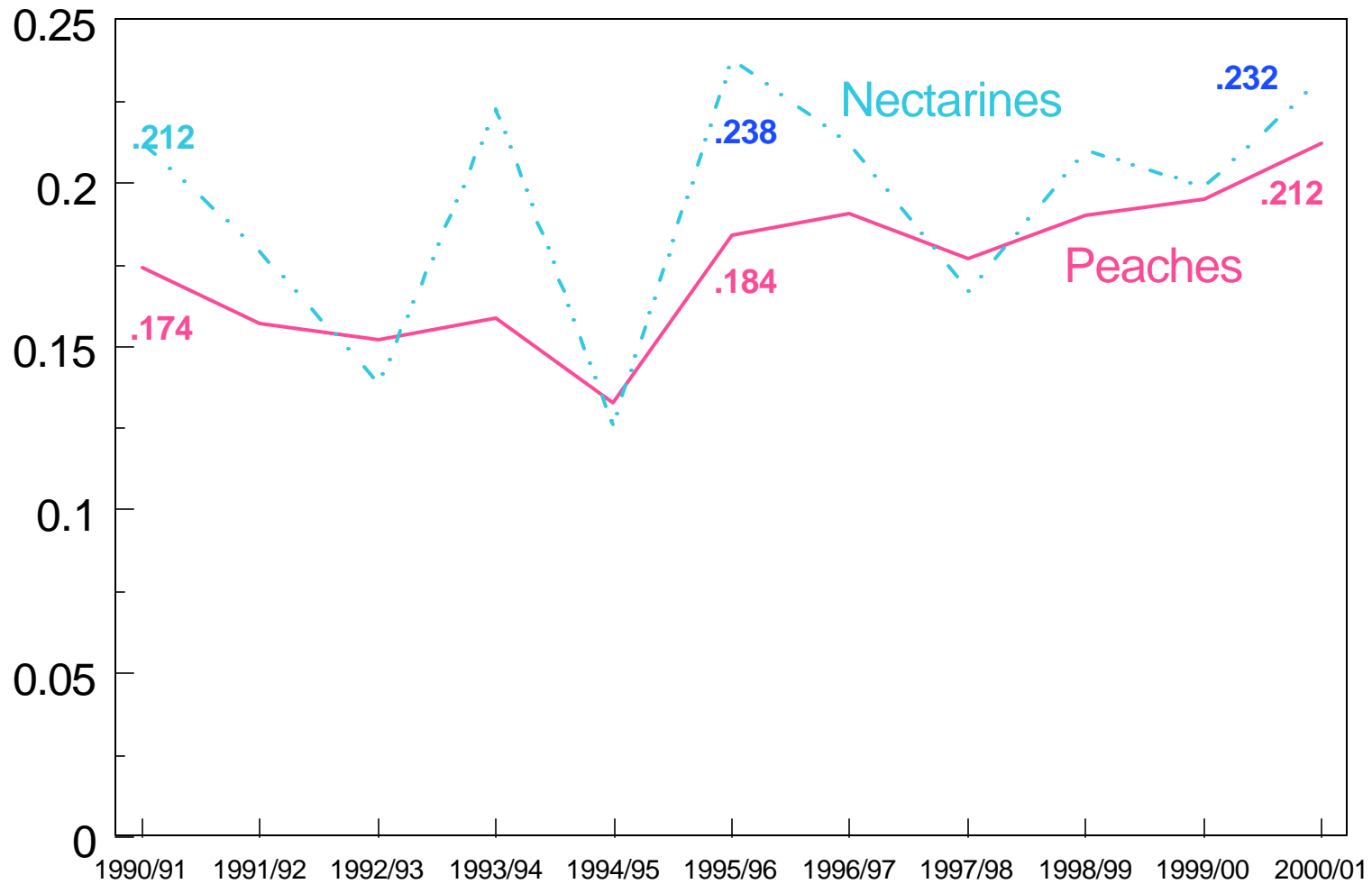
U.S. Peach & Nectarine Production Climbs; While Fresh Consumption & Exports Expand, Processing Slows



Source: USDA National Agricultural Statistics Service

U.S. Peach and Nectarine Prices 1/

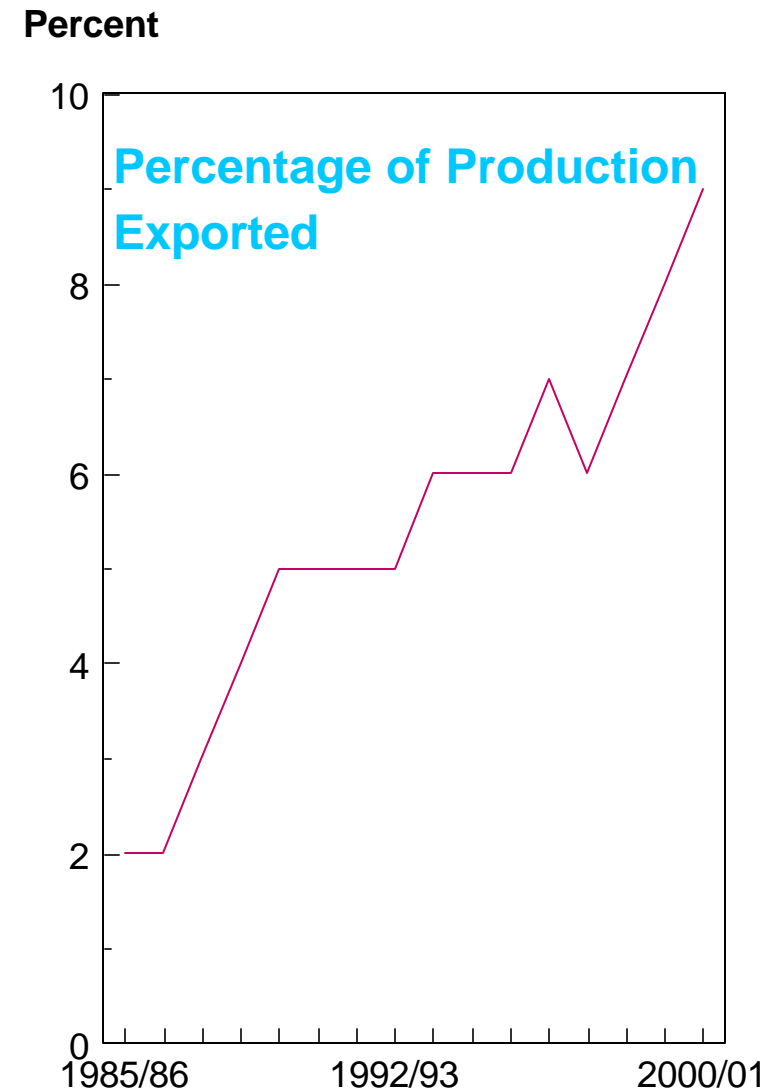
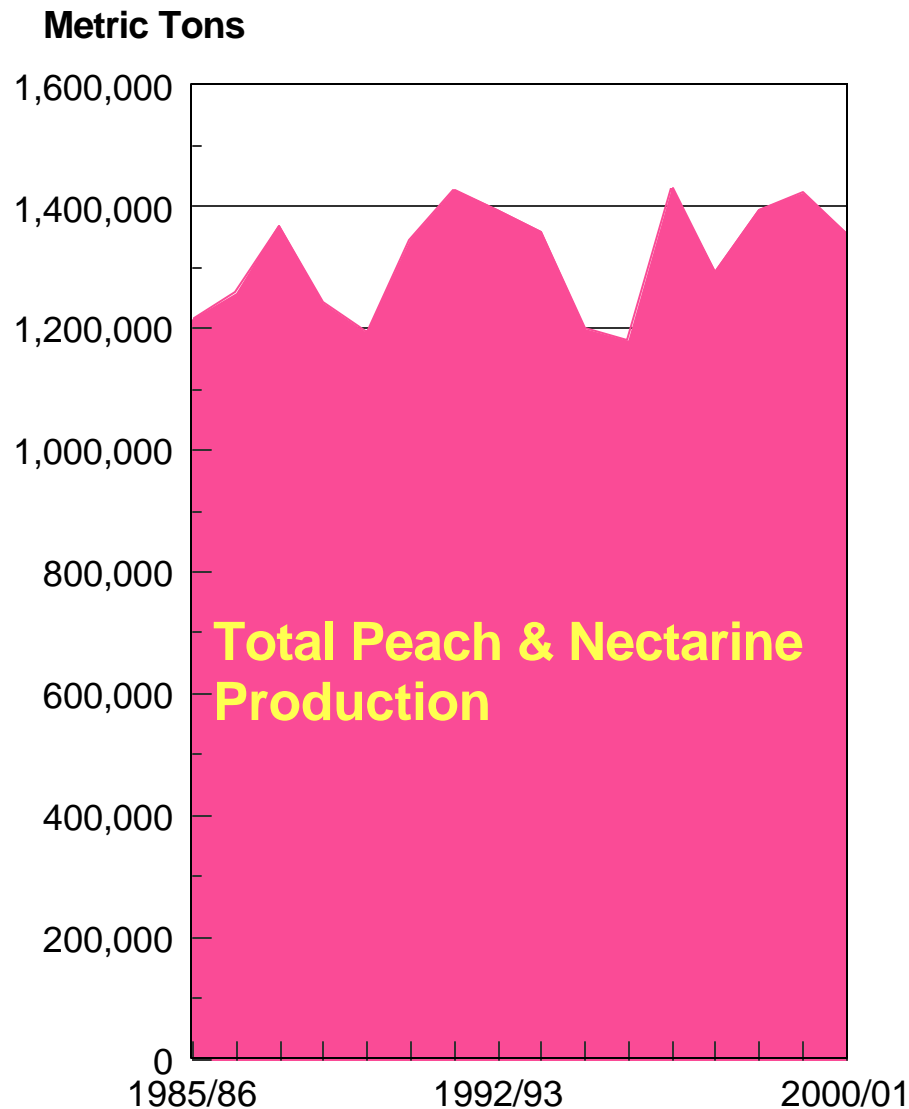
Dollars per
Pound



1/ Average dollars by pound received by states, marketing years June-May. Fresh fruit prices are equivalent packinghouse-door returns for the states of CA and WA except for bulk fruit at the first delivery point for CA Clingstone, and the average price as sold for other states.

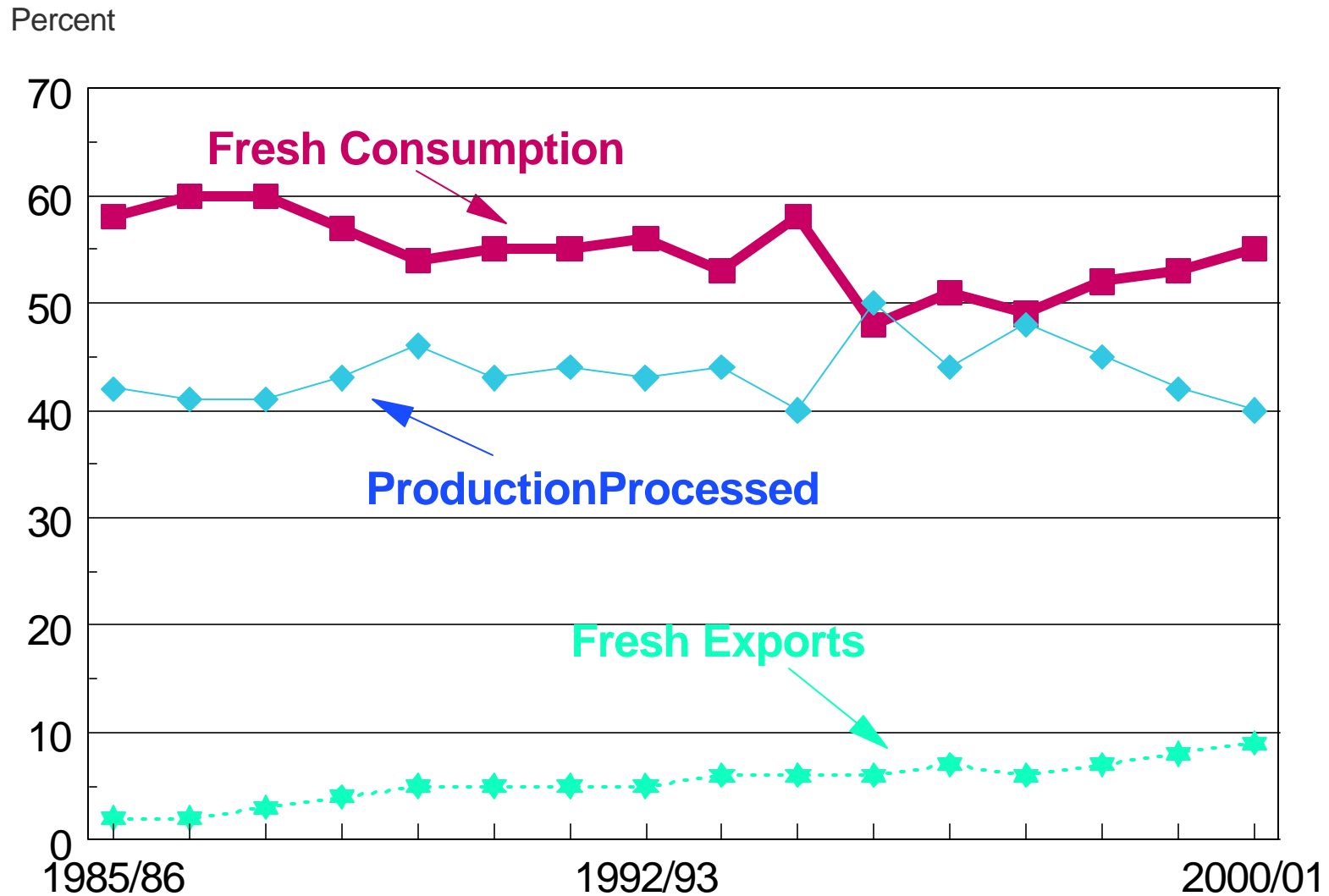
Exports of Peaches & Nectarines Continue to Show Slow But Steady Growth

Marketing Years June-May



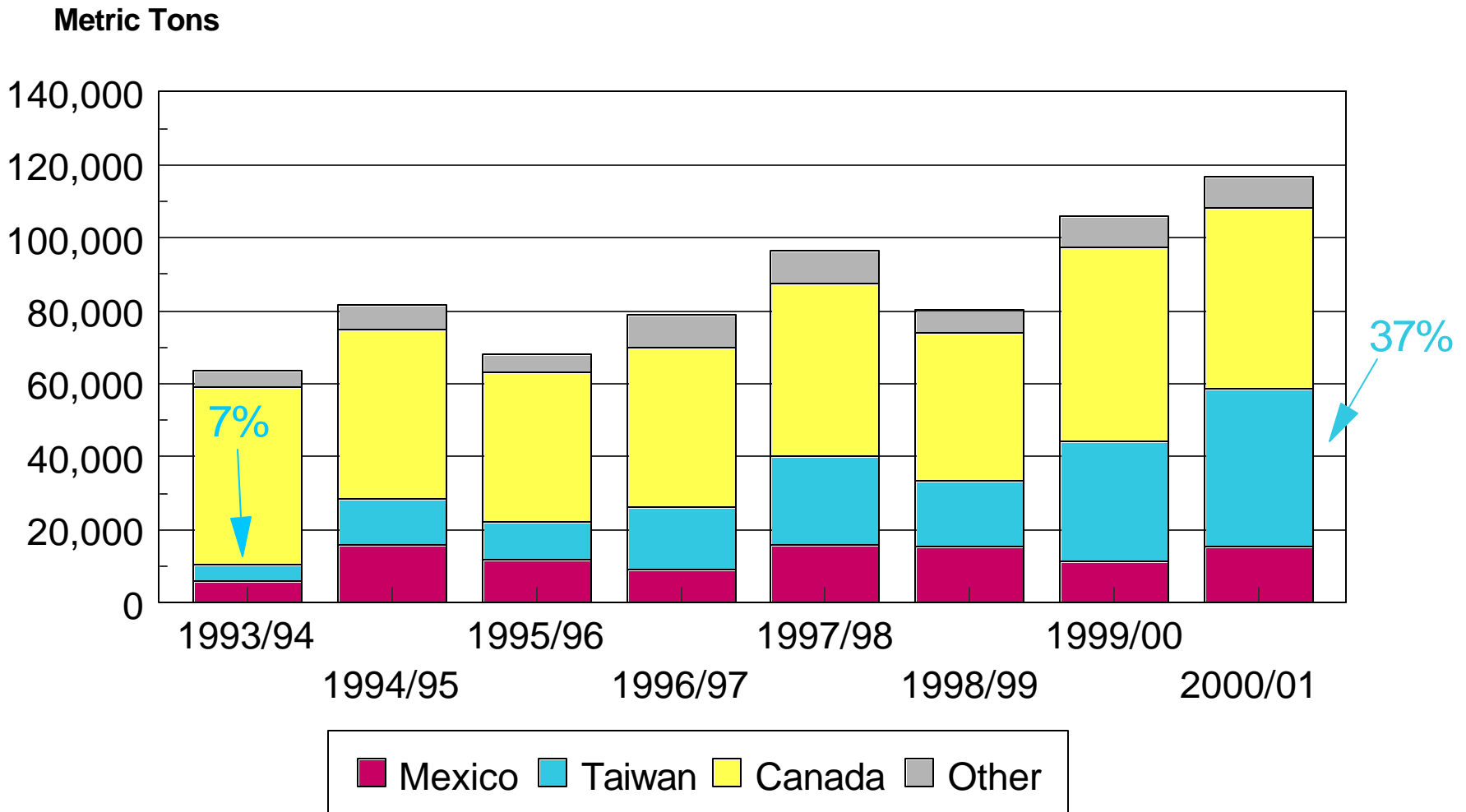
Source: U.S. Department of Commerce, Bureau of the Census

Exports Have Become Increasingly Important To The U.S. Peach & Nectarine Industries

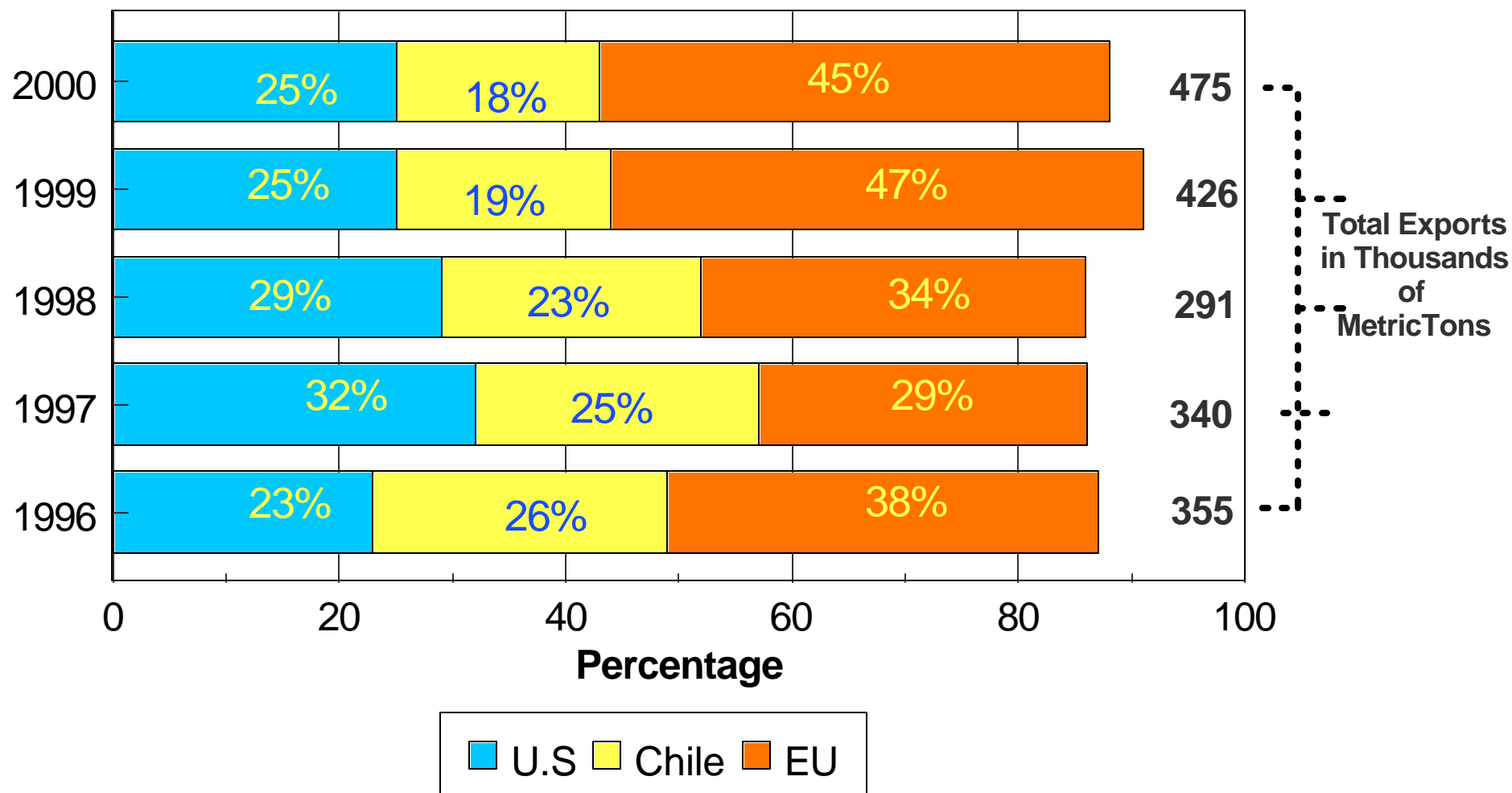


Source: USDA National Agricultural Statistics Service and FAS

Taiwan has become a Critical market for U.S. Peach & Nectarine Exports



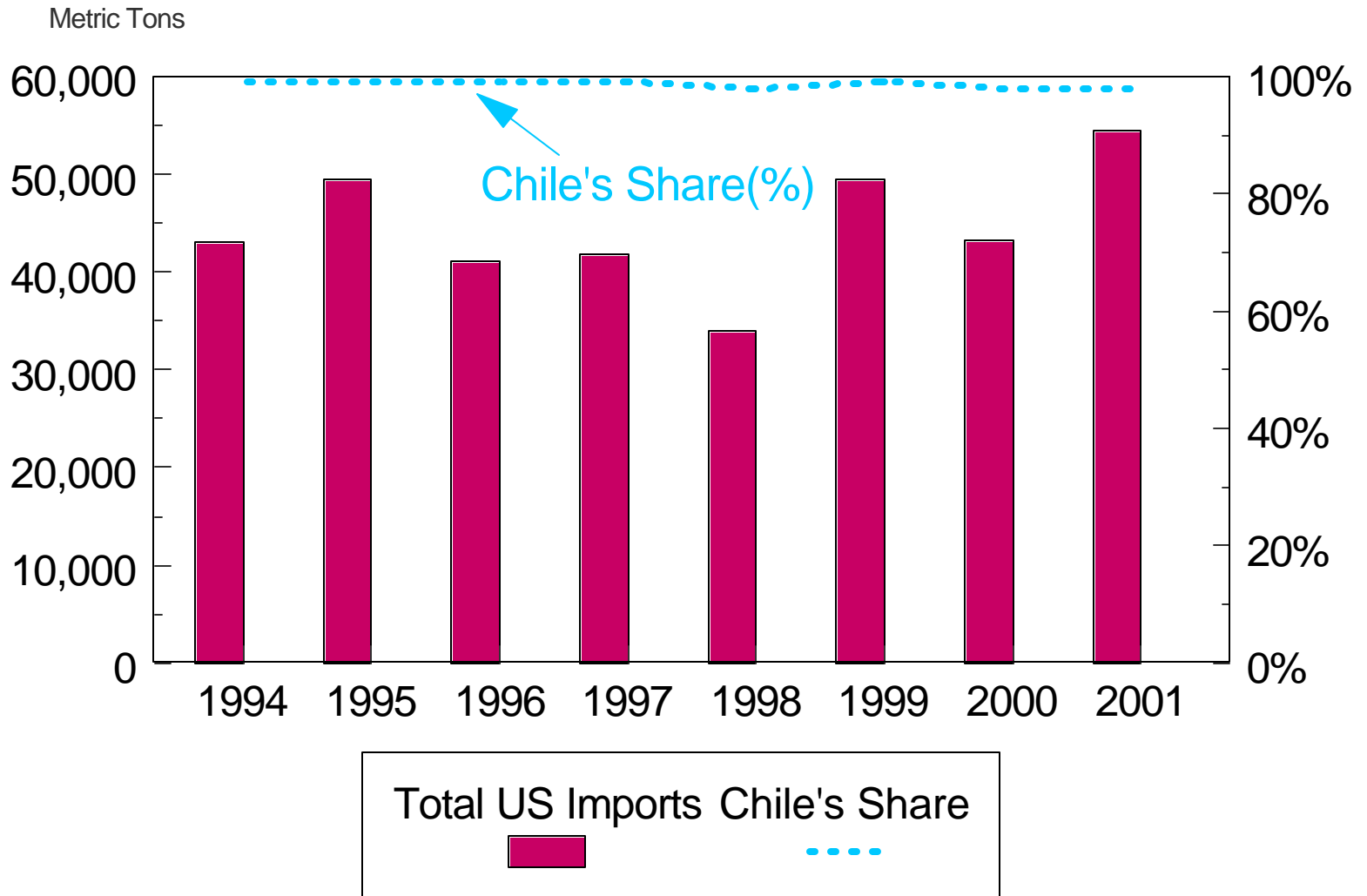
U.S. Share Of World Peach & Nectarine Exports Declines



Note: Data excludes intra EU peach and nectarine trade.

Source: FAO Database

Chile Remains the Dominant Supplier of Peaches & Nectarines to the U.S. Market

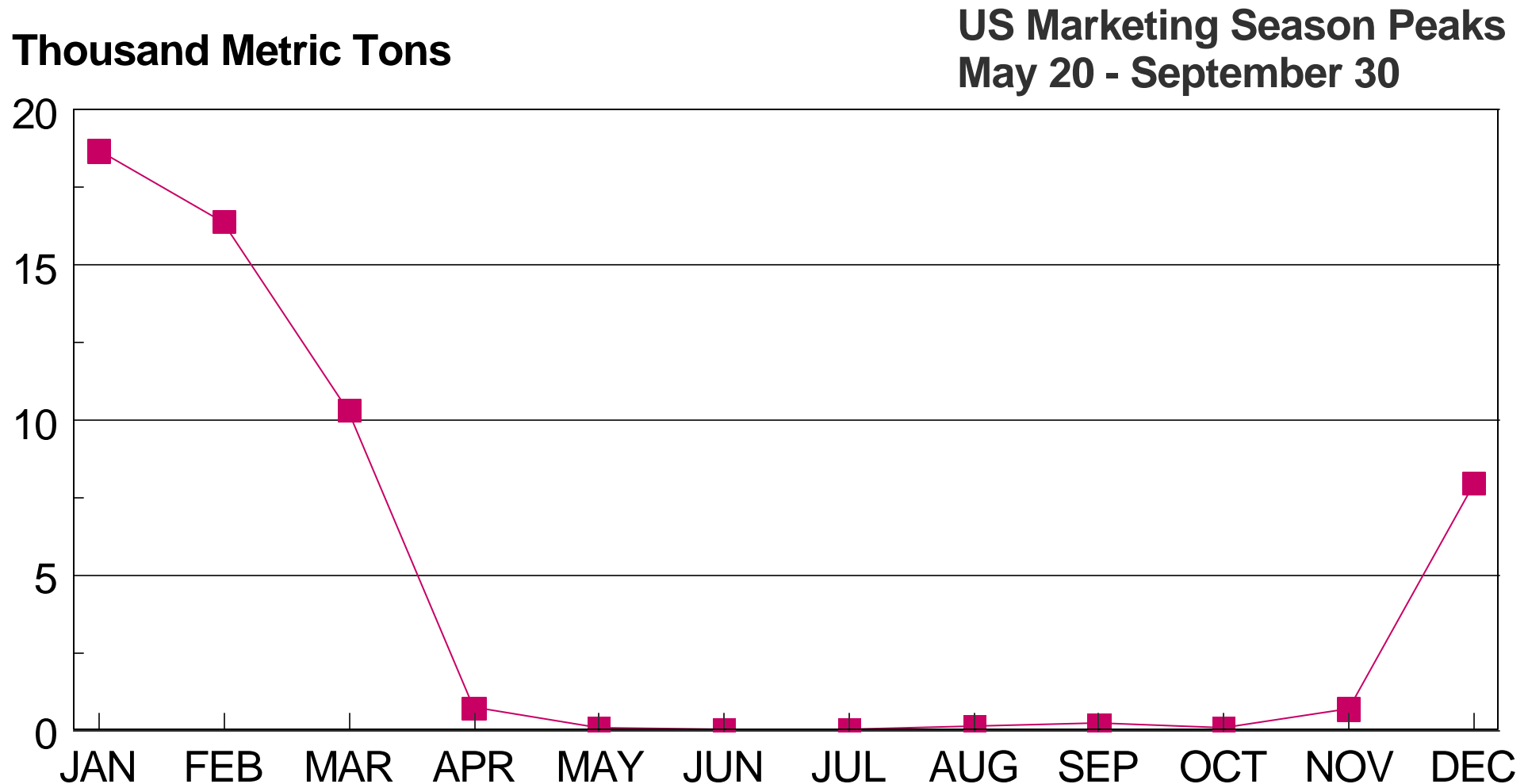


2001 Applied Peach & Nectarine Tariff Rates for Selected Countries

| Country | Applied Rate |
|-----------------|--------------|
| Canada | 0 - 8% |
| Mexico | 4% |
| Argentina | 25% |
| Chile | 8% |
| EU | 17.6% 1/ |
| Poland | 25% |
| Isreal | OQ 45% |
| Turkey | 55% |
| Egypt | 60 |
| China | 22% |
| India | 40.4% |
| Korea, Republic | 50% |
| Taiwan | 20% |
| Thailand | 60% |

1/ Plus entry price during the period 6/11-9/30: max 130 EUR/ton

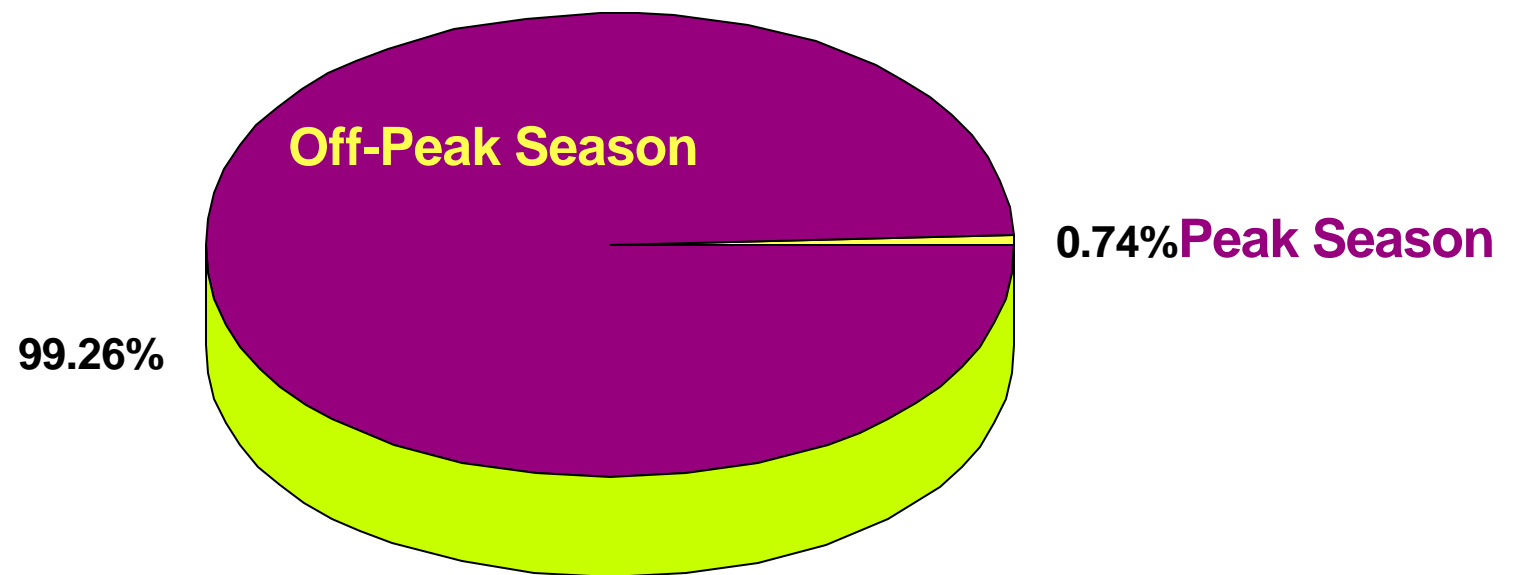
Monthly Imports of Peaches and Nectarines



Based on Monthly Imports for 2001

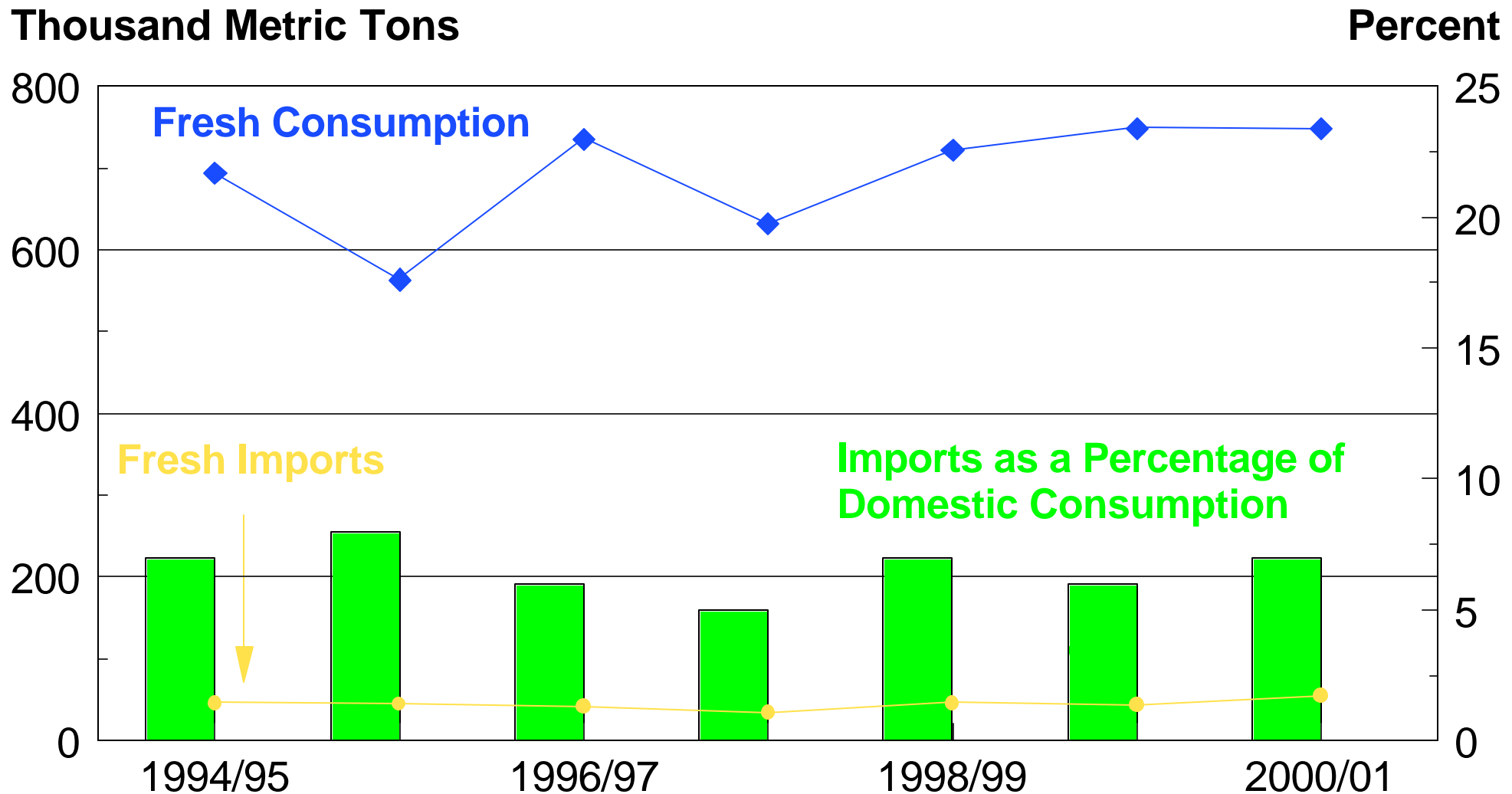
Source: U.S. Census Bureau

Share of Peach Imports in Relation to the U.S. Marketing Season



Based on Monthly Imports
Source: U.S. Census Bureau

U.S. Peach & Nectarine Imports and Market Share of Domestic Consumption



Source: USDA National Agricultural Statistics Service and FAS